

# Immigration Consult Screening Script

A free consult-screening script for immigration firms that need faster fit checks, cleaner first-call notes, and more confident next-step booking.

Immigration lawyers, intake teams, and legal admins

## GUIDE

A free consult-screening script for immigration firms that need faster fit checks, cleaner first-call notes, and more confident next-step booking.

## WHAT THIS ASSET COVERS

- A consult-screening flow for matter type, timing, status, and urgency
- Prompts for current location, filing stage, and prior representation context
- A note structure for lawyer review and consult scheduling

## USE THIS WHEN

1. The firm gets many unclear consult inquiries
2. Intake notes vary by who answers
3. Good-fit matters need a cleaner path into the calendar

## WORKING ASSET

## CONFIRM BASICS

- caller name
- best callback number
- immigration matter type
- current location
- timeline pressure

## CLARIFY FIT

- filing started or not
- represented now or before
- key documents ready or not

## ROUTE

- book consult
- request documents first
- not a fit

This is an intake workflow, not legal advice.

## DEPLOYMENT NOTES

### HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Immigration Consult Screening Script" become shared but unmanaged work.
- Use it with immigration lawyers, intake teams, and legal admins in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### HOW TO GET STRONGER OUTPUTS FROM MODERN AI MODELS

- Start with a compact context packet: business type, customer situation, service offered, tone guardrails, and any facts the model must preserve.
- State the deliverable shape up front: channel, word count, required fields, and the exact output format you want back.
- Use variables and clear delimiters so the prompt can be reused safely by staff without rewriting the entire instruction every time.
- Include one strong example when tone and structure matter, then ask for a final answer only rather than hidden reasoning.
- Add a final self-check step for compliance, specificity, and whether the response actually sounds like a real operator wrote it.

## **BEST DEPLOYMENT SEQUENCE**

- The firm gets many unclear consult inquiries
- Intake notes vary by who answers
- Good-fit matters need a cleaner path into the calendar

## **WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE**

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A consult-screening flow for matter type, timing, status, and urgency, Prompts for current location, filing stage, and prior representation context, A note structure for lawyer review and consult scheduling.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.